ATTORNEY OF RECORD: TO BE COMPLETED BY THE CONSERVATOR AND FILED THIRTY DAYS PRIOR TO THE GENERAL PLAN HEARING DATE. THE CONSERVATOR SHOULD RETAIN A COPY. A COPY OF THE PLAN AND INVENTORY AND APPRAISMENT MUST BE SENT TO THE COURT INVESTIGATORS OFFICE.

## SUPERIOR COURT OF CALIFORNIA COUNTY OF ALAMEDA

Conservatorship of the	) ) ) ) atee)	Probate No.		
[person/and/estate] of		CONSERVATORSHIP GENERAL PLAN		
conservate		Date: Time: Department:		
		of the person/estate of I Plan in compliance with local court rules.		
1. Conservatee's name, da	te of bir	th and Social Security Number:		
2. Address and telephone:				
3. Conservatee's residence	e:			
own home/apartment		conservator's home/apartment		
skilled nursing home		board and care home		
hospital (medical/psychiatric	c)o	ther (specify)		
How long has the Conservatee b	een in th	e present residence?		
, ,	_	n the Conservatee's residence in the nex		
Please note that the Court Investiga	tor's Offic	e must be notified of any change of address.		

	Current level of ca requires total care able to do own care ambulatory urinary/bowel incont		has fe	res assistance wi eeding tube wheelchair/walke catheter			
	er relevant information						
	Conservatee's phy _in in good health _confusion/disorienta _memory loss _takes regular medica se list health problems	tion	is developme unable to rea deaf or comr cribe	entally disabled ad/write munication proble	)		_
	often does the Conse or's name				· · · · · · · · · · · · · · · · · · ·		• 
	any other health provid _visiting nurse _podiatrist		social work				
	counselor		dentist physical the other (spec				
			physical the other (spec	ify)			
	counselor _speech therapy	expect to vi	physical theother (spec	rvatee?			
6.	counselor _speech therapy How often do you	expect to vis	physical the other (spectified sites the Consertions)	ify)rvatee? friends that will	visit?	•?	
6. 7.	counselor _speech therapy How often do you Does the Conserv Do you plan to rec	expect to visatee have ot	physical the other (spectified sites the Consertable sites the consertable sites at the conserta	ify)rvatee? friends that will the end of the fi	visit? rst year		
6. 7. 8. ——9.	counselor _speech therapy How often do you Does the Conserv	expect to vistatee have of quest consert (anticipated assignment)	physical the other (spectations) other (spectations) or the consense of the co	rvatee?  friends that will  the end of the fi  est) \$	visit? rst year	_	а
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10. cons	Conservated ervatorship of	e's Estimate f the person o	_	Expenses	(comple	te even	if a
LIVING EXPENSES  Rent/Mortgage		\$	Utilities		\$		
			\$	In-home o	oaro	\$	
	Nursing/Care	: поше			ale		
	Food		\$	Clothing		\$	
	Medical/Dent	tal	\$	Medicatio	ns	\$	
	Transportation	n	\$	Entertainr	ment	\$	
	Other (specif	y)				\$	
		Total Estima	ted Monthly I	Expenses	\$	<del></del>	
11.	Other Exper	ises					
TAXE	Income Tax Property Payroll	Curre Yo Yes	es1 es1	Estimated No \$ No \$			
INSU	RANCE	Company	Coverage Ar	mount Estin	nated nrer	mium	
Rente Auton	nobile er's Comp		\$\$ \$\$ \$\$ \$\$	_ \$_ _ \$_ _ \$_ _ \$_ _ \$_ _ \$_	nated prei		
Does	the Conservat	ee receive Me Yes			ost		
12.	•	pect to sell the next year	•			l or pers	onal
	If yes, explain	n reason					
13.		cipate any ui atee's estate			I to the m	anageme	nt of
	No	Yes (e	explain)				

The undersigned conservator will:

- Inventory all assets in which the conservatee has any interest;
- b. Render timely, accurate and complete accountings to the court;
- c. Carry out all mandatory usual and general duties of a conservator;
- d. Maintain periodic contract with the conservatee's physician and other health care providers, if appointed conservator of the person;
- e. Maintain periodic contract with the conservatee's family and friends, if applicable;
- f. Be available to the conservatee on a 24-hour basis for emergencies, or arrange for such coverage by a qualified agent;
- g. Maintain accurate records related to the estate;
- h. Maintain all estate assets in a separate identifiable manner;
- i. Maintain estate cash assets in interest-bearing accounts, except as necessary for everyday administration;
- j. Maintain an adequate surety bond as required by law.
- k. Update case plan as needed.
- I. Refer to the "Conservator's Handbook".

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that I have retained a copy of this case plan for my records.

Dated:	
	Signature of Conservator
	Type or print name